

## **Municipality Of Chatham-Kent**

### **Finance, Budget, Information Technology & Transformation**

#### **Information Technology & Transformation**

**To:** Mayor and Members of Council

**From:** Catherine Fitzgerald  
Director, Information Technology & Transformation

**Date:** January 6, 2021

**Subject:** Digital Transformation Project 2021 Budget Request

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This report is for the information of Council.

#### **Background**

The Information Technology & Transformation division has submitted a request for a Digital Transformation Project in the 2021 Municipal budget. This report and presentation are to provide additional information in considering this request during the 2021 Budget process.

On June 29, 2020, Council approved the Corporate Technology Strategic Plan (CTSP). Within this plan, 16 initiatives were identified as priorities for the corporation. Work from home and physical distancing requirements of the Covid-19 pandemic have exacerbated challenges identified in the CTSP and three key initiatives have been prioritized under the scope of a proposed Digital Transformation Project:

1. Enhance Information Sharing Capabilities and Electronic Records
2. Continue to Mobilize Field Staff
3. Expand Business Unit Process Automation

The Digital Transformation Project will also align with the implementation of a LEAN / Design Thinking framework to assess and prioritize projects.

On November 9, 2020 Council approved proceeding with a Municipal Modernization – Electronic Document and Records Management System (EDRMS) Assessment. The Digital Transformation Project will incorporate the findings of the EDRMS Assessment into the implementation plan. We expect the Digital Transformation Project will address many of the requirements of corporate EDRMS and provide a foundation for an EDRMS, however there may be specific requirements, especially related to records retention that may be out of scope for the Digital Transformation Project. The EDRMS Assessment Report will align with the planning phase of the Digital Transformation Project and EDRMS Report recommendations will be evaluated for alignment with the Digital Transformation Project.

The Digital Transformation Project is proposed in response to the CTSP which identified several existing challenges. Approximately 50% of Municipal employees do not have access to municipal technology. An *Employee Self Service Portal* was custom built and licensed to provide some basic information to all employees, including pay history, basic health and safety information, collective agreements and forms for printing. The existing *Employee Self Service Portal* was customized with an additional module to assist in communicating Covid-19 related information to employees and supervisors. While the *Employee Self Service Portal* addressed the need for a solution accessible to all employees without significant additional software funding, the portal not only requires significant technical resources to maintain, it also requires duplication of information as information is manually copied to this standalone environment. The Digital Transformation Project will eliminate this duplication of effort and data and create a single platform that all employees can use to access information and collaborate with their teams.

With approximately 50% of municipal employees without access to municipal computer systems, many business processes require labour intensive paper workflows. The Digital Transformation Project will create a single platform for all employee access and support the development of electronic communications and workflows for all staff and many business processes.

In addition to the *Employee Self Service Portal*, the municipality maintains a basic corporate intranet, used primarily for communicating information to connected employees, including forms, policies and general news. This corporate intranet was originally implemented in response to the internal requirements of the People Plan and Project Delta and has organically grown as new requirements were identified. The current corporate intranet is not aligned with the modern workspace requirements for information management and team collaboration and is at end of life for the technology. The Digital Transformation Project will replace the existing corporate intranet with a modern workspace platform.

Many business processes implemented at the municipality leverage pdf forms. Most of these forms have no integration with systems, resulting in manual processes for approval and transfer of information to the relevant systems or staff. The Digital Transformation Project will facilitate a standard forms system with opportunities to eliminate manual processes and repeated data entry into disparate systems.

One of the key recommendations of the Corporate Technology Strategic Plan was the implementation and recognition of data as an asset for the municipality. The Digital Transformation Project will include strong information management training and governance to ensure that employees and partners are able to locate authoritative and relevant information when needed.

### **Comments**

The Digital Transformation Project includes three main components:

## **Technology**

The Digital Transformation Projects includes a migration of our existing Employee Self Service portal, Corporate Intranet and other information management resources such as network shares and e-mail to the Microsoft365 platform. The Municipality is an existing user of Microsoft technology, a migration to the Microsoft365 platform aligns the municipality with the development direction of Microsoft. Microsoft365 is a fully supported cloud solution that facilitates enhanced Municipal business continuity. Migration to the Microsoft365 platform also aligns with the increasing demand for 'work from anywhere, on any device' due to Covid-19. We expect that the remote work requirements under the current Covid-19 pandemic will continue to be required as the workplace adapts to the long term hybrid work anywhere paradigm.

Many teams within the Municipality work with external stakeholders and boards. The Microsoft365 platform also facilitates improved collaboration with external parties, providing a controlled platform for collaboration and communication that is not readily available with the technology currently in use at the municipality.

## **Governance**

In order to successfully implement a corporate solution that is optimized for both the organization and the business units, a governance structure will be established to provide oversight to the strategic direction for Microsoft365 including the selection and prioritization of feature sets based on corporate and business unit need. The governance structure will also assist with the creation, review and validation of policies for the new platform.

While some governance policies and procedures can be automated, governance will require participation from stakeholders across the organization and relevant training for all users regarding the implementation of policies the security of information management.

## **Skills & Mindset**

Implementation of Microsoft365 in the organization requires a significant investment in reskilling the workforce. Training on the use of new functionality within Microsoft365 will ensure that every municipal employee knows how to fully utilize the tools available to them. In addition, information management is critical to the success of the Digital Transformation project. While information management can be governed and automated to some extent, all municipal employees will need a level of understanding of information management principles as well as an understanding of the expectations and tools available to them to manage the information relevant to their role.

Successful Digital Transformation not only requires training on how to use the specific technology solution, it also requires an investment in a way about thinking about problem solving. The Digital Transformation project aligns with the implementation of LEAN Process Review/Design Thinking approaches to assess and prioritize projects. The Microsoft365 platform will give employees access to many tools to self-service improvements to their business processes without a requirement for extensive technical resources for custom work. The training provided through the Digital Transformation

project will not only focus on the technical use of software and management of information, but also invest in digital competencies for business unit technology champions such as continuous business process improvement, customer centric service delivery, privacy, collaboration and transparency.

The Digital Transformation project includes investment in resources for 2 temporary trainers for one year each who will provide relevant training to all municipal employees based on their role in the organization.

The Digital Transformation project also includes investment in resources for 2 temporary technical staff for 2 years to complete the technical implementation.

### **Consultation**

The Corporate Technology Strategic Plan included consultation with all departments and municipal stakeholders. The recommendations of this report are a direct outcome of the Corporate Technology Strategic Plan.

In preparation for this project, the Information Technology & Transformation team consulted with a Microsoft Tier 1 System Integration partner *Softlanding* to conduct an assessment of the current Municipal environment and develop an implementation roadmap for this initiative.

The Information Technology & Transformation team also consulted with stakeholders across the organization regarding corporate communication requirements with a focus on employees who do not currently have full access to municipal technology.

### **Financial Implications**

There are no immediate financial implications to this report. Funding of an estimated cost of \$1,200,000 for this project has been submitted to the 2021 Budget process and will be funded entirely from Information Technology & Transformation Reserves.

Prepared by:

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Reviewed by:

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Chief Financial Officer / Treasurer /  
General Manager, Finance, Budget, Information Technology & Transformation

Attachment: Corporate Digital Transformation Project 2021 Supplementary Budget –  
Briefing Note

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Digital Transformation 2021 Budget Request.docx

## Supplementary Budget – Briefing Note

## 2021 Budget

## Corporate Digital Transformation Project

**Briefing Note required for:**

- items +/- \$50,000 or more
- changes in FTE
- Council Priority requests

Dept	Division	Business Unit	Item	Base Supp	Amount	FTE Impact
FBITT	ITT	13903	Purchase of Service: Consulting Services/Professional Services for the implementation of a new Corporate Intranet, migration of existing Intranet sites, establishment of an MS 365 information governance program, and merging of Employee Self Service using MS 365 and SharePoint Online.	S	\$650,000	
FBITT	ITT	13903	Corporate Intranet & MS 365 Migration Technical and Training to support current users, new frontline/field and mobile user base 2 Years x 2 Grade 8; 1 Year x 2 Grade 5	S	\$550,819	6.00
FBITT	ITT		ITS Applications Reserve ITS Computer Software Reserve ITS Strategic Plan Reserve ITS Web Reserve ITS Server/Storage Reserve	S	(\$600,819) (\$100,000) (\$100,000) (\$200,000) (\$200,000)	
			<b>Total:</b>		<b>\$0</b>	<b>6.00</b>

**Background:**

-Briefly provide why this is a request (eg. Based on 3 year history)

This request is a corporate related item and initiative for corporate digital transformation. This brief will align with the Electronic Records Management – Corporate Assessment initiative.

In support of the organization's planned migration to Microsoft 365 (MS 365) and SharePoint Online this initiative aligns with CK Plan 2035, and is identified as a priority in the Corporate Technology Strategic Plan (CTSP). The ITT division is seeking to implement the recommendations for the organizational MS 365 strategy and roadmap, migration plan, and Corporate Intranet launch as advised by Corporate Stakeholders and Chatham-Kent Microsoft Gold Partner Consultants.

Migration to Microsoft 365, SharePoint Online, and adoption of these recommendations:

1. Enables the organization to address the needs of current and new Intranet users (frontline/field, and mobile workforce) identified during 2018-2019 ITT stakeholder review sessions conducted with 13 divisions.

**Background:**

2. Eliminate the need to duplicate corporate information and content via email and redundant Employee Self Service site.
3. Satisfy the need of every Municipal employee to be provided access to Corporate Information via a corporate intranet as an essential requirement for every Municipal employee.

**KEY Value Proposition:**

1. Centralization of Knowledge and Resources:
  - a. Reduce the number of redundant information silos for more efficient customer service
  - b. Preserve organizational knowledge
  - c. Establishment of an information governance program and improve informational compliance
2. Improve Support and Sustainment Capabilities:
  - a. Many divisions and employees are requesting immediate solutions for file hosting services that offer cloud storage/file synchronization as well as collaboration sites (OneDrive & Teams) for efficient service delivery and access to citizen and client case files. These requirements are heightened under the Covid remote workplace and physical distancing requirements.
  - b. Improve employee's ability to "self-serve" through employee training modules and workshops.
3. Enhance Collaboration:
  - a. Improved employee satisfaction and engagement by the establishment of a new CK Employee Information Hub intranet site.
  - b. Enablement of secure file sharing and real-time co-authoring capabilities to reduce the number of uncontrolled document versions.

**Comment:**

- provide any further details if required, impact to user fees, etc. (e.g. Gross expenses, any revenues, subsidies, etc.)

**Related Projects and Existing Budget:**

1. Licensing and training of frontline/deskless workers has been funded as part of the approved CAO Projects Resourcing Strategy.
2. An IT Project Manager Position has been funded as part of the approved CAO Projects Resourcing Strategy.
3. The corporate Microsoft software licensing enterprise agreement is due for renewal in 2021.

**Recommendations:**

1. Leverage Microsoft Certified Gold Partner professional services to perform the SharePoint cloud migration.
2. Four Additional Project Roles required to support these initiatives:
  - a. One Application Administrator with a 2 Year Contract Requirement = 2 FTE (1 FTE per year of contract):
    - i. MS 365 and SharePoint technical readiness, migration support, and administration.
  - b. One Business Analyst with a 2 Year Contract Requirement = 2 FTE (1 FTE per year of contract):
    - i. Support business process analysis, information management, and content migration;
  - c. Two Microsoft 365 Trainers, 1 Year Contract Requirement each = 2 FTE:
    - i. Corporate Intranet & MS 365 Trainers to develop and deliver online training modules to staff;
    - ii. Support the organizations migration to Microsoft cloud hosted services including SharePoint Online, Office 365, and OneDrive.